Spring 2006
Industry Study

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News Media Industry

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NEWS MEDIA 2006

ABSTRACT: The American news media industry is characterized by two competing dynamics – traditional journalistic values and market demands for profit. Most within the industry consider themselves to be journalists first. In that capacity, they fulfill two key roles: providing information that helps the public act as informed citizens, and serving as a watchdog that provides an important check on the power of the American government. At the same time, the news media is an extremely costly, market-driven, and profit-oriented industry.   These sometimes conflicting interests compel the industry to weigh the public interest against what will sell. Moreover, several fast-paced trends have emerged within the industry in recent years, driven largely by changes in technology, demographics, and industry economics.   They include: consolidation of news organizations, government deregulation, the emergence of new types of media, blurring of the distinction between news and entertainment, decline in international coverage, declining circulation and viewership for some of the oldest media institutions, and increased skepticism of the credibility of "mainstream media." Looking ahead, technology will enable consumers to tailor their news and access it at their convenience – perhaps at the cost of reading the dull but important stories that make an informed citizenry. Changes in viewer preferences – combined with financial pressures and fast paced technological changes– are forcing the mainstream media to re-look their long-held business strategies. These changes will continue to impact the media's approach to the news and the profitability of the news industry. Though the number of news gatherers is falling in proportion to the news sources, the diversification of the means by which consumers can access news bodes well for an American public that takes pride in free and open access to information.

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Domestic

ABC News, NY, NY
Al Hurra, Springfield, VA
Al Jazeera, Washington, DC
Associated Press, NY, NY
Associated Press Broadcasting, Washington, DC
Bloomberg News, NY, NY
CBS News, NY, NY
The Colbert Report, NY, NY
Columbia University, Graduate School of Journalism, NY, NY
CNN, Washington Bureau, Washington, DC
The Daily Show, NY, NY
Freedom Forum, Arlington, VA
Fox News/News Corp, NY, NY
Military Times, Springfield, VA
National Public Radio, Washington, DC
Nielsen Media Research, NY, NY
Office of the Secretary of Defense, Public Affairs, the Pentagon, Washington, DC
Department of the Navy, Public Affairs, the Pentagon, Washington, DC
The New York Times, Washington Bureau, Washington, DC
Reuters East Coast Bureau, NY, NY
Univision, Washington, DC
Voice of America, Washington, DC
The Wall Street Journal Online Edition, NY, NY
The Washington Times, Washington, DC
WTOP Radio, Washington, DC
XM Satellite Radio, Washington, DC

International

British Broadcasting Corporation World Service, London, England
Duna Television, Budapest, Hungary
The Economist, London, England
Financial Times, London, England
Gazdasági Rádió, Budapest, Hungary
The Guardian, London, England
Heti Valasz, Budapest, Hungary
Inforadio, Budapest, Hungary
The Times, London, England
Magyar Nemzet, Budapest, Hungary
Magyar TV, Budapest, Hungary
Metro, Budapest, Hungary
Nepszava, Budapest, Hungary

MTI (Hungarian News Agency), Budapest, Hungary
Ministry of Defense, London, England
SKY Television, London, England
Novy Cas, Bratislava, Slovakia
Pravda, Bratislava, Slovakia
Radio Express News Agency, Bratislava, Slovakia
SITA News Agency, Bratislava, Slovakia
TASR News Agency, Bratislava, Slovakia
TV Markiza, Bratislava, Slovakia

Introduction

The news media are a fundamental institution in American society, protected by the First Amendment and charged as the people's counterweight to government. Leaders throughout our history have felt the uncomfortable spotlight of journalistic scrutiny and complained of media excesses. However, few would deny the importance of a vibrant, healthy news media in our free society. Unfortunately, the news media are misunderstood. The fallout is well documented throughout our history – much of it recent history. This industry study paper attempts to illuminate the sources of this recurring misunderstanding; taking a broad brush approach to capture the news media's priorities, perspectives and challenges for the future. We will examine and attempt to define news; a difficult task in the rapidly changing information environment. In the end, it is our hope that this paper provides its readers with a deeper understanding of the news industry and better prepares future leaders to engage the media effectively and thrive in the transparent information environment of the future.

The News Media Industry Defined

The news media industry is a conglomeration of media corporations who gather, analyze, compile and distribute current information for profit. Within the United States, that definition remained largely unchanged since the time of our founding – at least until recently. Today's news media are under a great deal of pressure, driven largely by forces of convergence. They will undoubtedly have to adapt in order to survive. Unfortunately for the industry, it is unclear what strategies will lead to profitability in the long term. As the industry is forced to cope with market forces, companies are struggling to understand and adapt to the uncertainties of the current market environment. As Ken Sands, online publisher of the Spokesman-Review in Spokane, Washington, sums up the situation, the news media have to, "fly into the future and build the plane while it's in the air" (Howell, 2006, p. B6). As these financial concerns drive news media business decisions, there are considerable implications for journalism.

As we attempt to define the news media industry, it is equally important to define what actually constitutes the news. The forces of change mentioned above have had a major impact on how news is defined and presented to consumers. Over the past few decades, there has been a general "lessening" of the news. In 1981, a 30 minute evening news show contained 23 minutes and 20 seconds of news. By 2000, this time had been shortened to 18 minutes and 20 seconds (Hamilton, 2004, p. 174). Some observers are particularly concerned by the drop in coverage of international issues, which gives viewers searching for greater exposure even less reason to watch these programs. As noted by Tom Rosenstiel in 1994, "surveys consistently reveal that the public doesn't care as much about foreign news. So while the networks have good people abroad, executives limit foreign news on their broadcasts" (Hamilton, 2004, p. 177). The key point is not only what the surveys revealed, but also that news executives are now basing content decisions on survey results. Some have even cited this drop in foreign coverage as an explanation for why some Americans were shocked by 9/11 and could not fathom why "they" hate us so much. Had they been exposed to increased coverage from the Middle East, the argument goes, Americans might have been able to understand, and better deal with, the attacks (Anderson, 2004, pp. 29-30).

In addition to the reduction in quantity of news, many have also claimed that the changes of the 1980's and 1990's have produced an overall lowering of the quality of news. By this the critics mean that in a search of profits and audience share, news shows have reduced their hard-news coverage in favor of the soft, informational and entertainment news stories that would appeal to the generally younger demographics sought by advertisers. J.T. Hamilton, Professor of Public Policy, Economics, and Political Science at Duke University has shown this in a clever and fairly scientific manner by looking at the percentages of key events covered over time by the networks. For example, he used a tally of key votes as defined by the Congressional Quarterly, and found that from 1969 through 1973, 61.0 to 75.2 percent of the Congressional votes were covered in one of the Big Three networks' news shows. From 1994 through 1998, this percentage had dropped to 47.6 to 54.4 percent (Hamilton, 2004, p. 181). He found similar drops for other hard subjects such as key Supreme Court decisions.

Hamilton's same survey found that coverage of soft news (defined by the percentage of TV stars/movie actors/athletes/crime figures/royalty on *People* magazine's annual "Most Intriguing People" list covered by a network news broadcast) increased from 39.6 percent in the period from 1974 to 1978 to 51.9 percent in the period from 1994 to 1998 (Hamilton, 2004, p. 178). A similar perspective is shared by *CBS News*, where news executive Van Gordon Slater's philosophy during this period became that "every news broadcast needs moments" that would have resonance with the audience" (Barkin, 2003, p. 82). CBS anchor Dan Rather put it in different terms, saying that *CBS News* began to use the "back fence" principle to choose the types of stories that neighbors would discuss when they met behind their houses (Barkin, 2003. p. 83).

Perhaps one of the best observations on the lowering of the news comes from Roger Ailes. When he was still a political consultant, he chided the news shows for thinking they were operating on a loftier plane than the consultants: "Just admit it. Folks, we're in show business. You are the audience, and everybody is trying to get you and entertain you. We'll give you whatever you want because we're all in this business of selling" (Hamilton, 2004, p. 173). What makes this statement so powerful is that Ailes later went on to be the head of *FOX News*, and led the way in shaping news to fit the desires of a targeted audience.

Current Conditions

Although predicted for more than a decade, the arrival of the age of media convergence caught the news media largely unprepared and is driving fundamental changes in the way the industry conducts business. Convergence is forcing the news industry away from traditional business models focused on *sources* of information toward a model based solely on the information itself. As a result, news sources (newspapers, magazines, television, or even the Internet) have become less relevant than the content they provide. Now more than ever, the emphasis of the news is speed -- dramatically accelerated by today's information technology. Branding has lost much of its relevance, as fewer and fewer consumers care if their news carries the *Washington Post* or *CBS Evening News* stamp of approval. Today's technology-savvy consumer cares only that the news is fast, accessible, and, most disconcerting to the news industry, that it is free. Consumers are also less interested in traditional sources of analysis. They have many more alternatives today and will seek out analysis whenever it's convenient.

They're also spending far less time on a single source of information; bouncing from source to source as a matter of routine. For potential advertisers, this creates a real problem. If sources can't hold readers, they can't ensure any message reaches its targeted consumers. Worse yet, advertisers no longer have an easy formula to effectively cover the myriad of information sources their target audience routinely views. At the same time, advertisers now exult at being able to determine exactly which Internet ads on which sites generated sales. The implications for the news media as a whole are huge, as billions of dollars in revenue are at stake.

Driving Forces: The primacy of content is the result of the three forces driving convergence – *technology, changing consumer behavior* and *increased pressure for profitability.* These three forces are the catalysts of change and have pushed the industry into a new era most media outlets are still struggling to understand. Even those that seem to understand it have yet to develop a business model that works in this new marketplace.

Technology: Technology has done the most to drive the media toward convergence. It has fundamentally changed the business model and has almost single-handedly reduced profitability for media outlets across the board. Technology, particularly the explosion of high-speed Internet services, has also changed the news cycle and news distribution. Consumers now embrace technologies to interact, express and engage like never before (Rafee, 2005, p. 14). The Internet has created a 24-hour-a-day, seven-days a week news cycle. Reporters no longer have the luxury of days, or even hours, to get the story right. Consumers now *expect* instantaneous news. No longer happy with their parents' news, they also expect a broad range of choices. As Azhar Rafee, the global head of *Reuters.com* describes it, "there's a preference for news consumption where the consumer is a part of the ongoing debate rather than the 'voice of god' media approach we are familiar with" (Rafee, 2005, p. 16). And today's information environment is ideally postured to service these diverse needs. Rafee concludes, "The consumer is hugely interested in the news events from around the globe and yet, for the first time, consumers are truly participating in the events and how they're reported. Technology and innovation will continue to enable this. These demands place great pressure on traditional news sources, who now find themselves searching for a new business model in order to compete.

Consumer Behavior: Changes in consumer behavior began with the growth of broadcast television in the 1960's and 70's, and spread to cable television in the early 80's. As news matured in the evolving television environment, the lines between news and entertainment began to blur. Cable networks continued this blurring by creating a twenty-four-hours-a-day demand for content that could not always be filled by the news of the day. To fill air time, "infotainment" found its way into the news. As the media and its advertisers came to realize the drawing power of this content, the news gradually became more entertainment oriented. Today, we have an entire generation of adults who grew up with "infotainment" and don't differentiate between it and the news. Their viewing habits haven't gone unnoticed by marketers and are reflected in the current mix of news content. "Media multi-tasking" has also taken hold, as people are spending more time immersed in multiple media sources. Where once only the television was on; today's consumers are watching TV, surfing the net, streaming audio or video, and downloading to their iPod, all at the same time. New forms of consumer generated media, such as blogs, *Wikipedia,* and *Flickr* are also competing for the attention of younger viewers (Rafee, 2005, p. 15). According to research conducted by University of North Carolina

journalism professor Philip Meyer, news gathering habits people develop in their twenties stick with them as they age (Crosbie, 2004). It would make sense then that, "people age 34 and older turn to the printed paper as their source of news as they came of age before the emergence of the Web as a mass information tool and that younger people turn to the Internet as their primary source of news" (PEJ, 2006). An explosion of media outlets means we now have more coverage about every conceivable event than ever before. Ironically, we also have less reporting. The number of old-fashioned fact-gatherers is dwindling, replaced by talking heads. Their numbers will almost certainly continue to shrink (Kurtz, 2005). These trends have serious implications for both the news media and its advertisers. The viewing habits of today's younger consumers no longer match the business models they created and they must change those models if they are to remain profitable.

Pressure for profitability: News media organizations answer to investors seeking a financial return. Some journalists find the idea of the news as a profit-driven business distasteful. But like it or not, today's business models demand a return on investment. Those who don't pay attention to the demands of investors will find themselves out of a job or under the ownership of someone who does. The news media make money in two ways. Its biggest source of revenue is advertising. The second source, sale of its products, has steadily declined as technology and demographics change the industry model. In its most extreme form, we now have young, technology-savvy users who are unwilling to pay for any content. Without this source of income, the media must rely almost exclusively on advertisers. Advertisers are primarily interested in viewership and their influence has pushed the news toward a greater emphasis on ratings. As long-time *Nightline* anchor Ted Koppel describes it, "with the advent of cable, satellite and broadband technology, today's marketplace has become so overcrowded that network divisions are increasingly vulnerable to the dictatorship of the demographic" (Koppel, 2006). He continues, "Now, every division of every network is expected to make a profit. The goal for the traditional broadcast networks now is to identify those segments of the audience considered most desirable by the advertising community and then to cater to them" (Koppel, 2006).

Market Segments:

Network Television: The nature and structure of TV network news have changed dramatically since the 1960's-1970's, a period when they dominated the market and played an important role in setting the national debate. Deregulation, the emergence of new competitors and new technologies, the "corporatization" of network ownership and its concomitant focus on profits and other, broader social factors have all combined to reduce the network's viewership and opinion-making power. It has also led the networks to adopt changes to chase market share, changes that have usually meant increasing focus on soft news and reducing coverage of international events. The 2006 edition of the *State of the News Media* report notes that "from the start of *CNN* in 1980, nightly news viewership for the Big Three networks has fallen by some 25 million, or 48%" (PEJ, 2006). The trend has not slowed; the same report found that from November 2004 to November 2005, the network news' rating dropped 6% and the audiences share dropped 3% (PEJ, 2006). With fewer people watching, and with those who are getting less hard news, there is legitimate concern that this segment of the media sector is not playing the role some think it should in a democracy.

Cable News: Today's cable news media informs and entertains, but it is far from an ideal news source. The Project for Excellence in Journalism's 2005 survey of cable TV news and other news media segments found that "…the content of cable news is measurably thinner, more opinionated, and less densely sourced than other forms of national news" (PEJ, 2005, p.1). The Project also found that an astoundingly high seventy three percent of the time cable TV news reflected only one viewpoint. In contrast, network evening news reflected a mix of viewpoints seventy two percent of the time" (PEJ, Content Analysis, 2005, p.5). This inverse relationship undoubtedly has impact on the believability of cable TV news.

While all three major cable TV news outlets have generated profits since 2004, their bottom lines were undoubtedly assisted by the convergence of heavy ad spending for the last presidential election and promotional advertising for the Summer Olympics. *CNN* demonstrated early-on that a 24/7 news operation could be consistently profitable. Nine years ago, "…*CNN's* net profits were $275 million; in 2005 *CNN*'s net profits were circa $300 million" (PEJ, 2006, p. 2). *MSNBC* leverages the *NBC* news organization to improve profitability. *Fox News* has an operating model that differs from *CNN* or *MSNBC*, building its operating model based on anchor personalities so as to reduce the cost of newsgathering. In addition, the total viewership of prime time cable news lags far behind its broadcast counterparts. *Fox News* is the prime time cable TV news leader with 1.6 million median viewers, followed by *CNN*, with 725,000 prime time viewers. Traditional network television would not tolerate viewership of circa one million prime time viewers and any prime time broadcast with less than eight million viewers is at risk for cancellation.

Newspapers: The newspaper industry is in trouble. Circulation of daily newspapers in the United States has been in slow, steady decline for the past 30 years and its deterioration has begun to accelerate. Prior to 2003, "daily losses were less than 1% a year…and Sunday circulation was shrinking less, about 0.5% a year" (2004 Editor and Publisher Yearbook). Beginning in 2004, losses began to accelerate, with 2004 daily circulation across the U.S. newspaper industry dropping 560,000 papers (1%) and Sunday circulation down by 740,000 papers (1.3%) (Newspaper Association of America, 2005). Daily circulation in 2005 dropped 1,420,000 (2.6%) and Sunday circulation was down even more, 1,800,000 (3.1%) (Newspaper Association of America, 2005). The losses during these two years were most severe at larger metropolitan newspapers, with the daily circulation at the *Los Angeles Times* down 9.3%, the *Chicago Tribune* down 8%, and the *Washington Post* off 7% (PEJ, 2006). These numbers are attributed to, "an evolution in media technologies that is leaving the newspaper behind" (Crosbie, 2004,). Today, there are thousands of constantly updated daily news sources people can turn to for current, breaking news throughout the day. With each passing day, reports in the newspaper are seen as stale by the time they come out and print editions are becoming less relevant and less popular in people's lives (Crosbie, 2004). The newspaper industry is in trouble! "As new technologies and business models continue to emerge, the world of the newspaper publisher is growing progressively darker" (Anthony, 2005, p.4).

Radio: Of the traditional news broadcasting media, radio has been the most stable. Stable, that is, until 2005. Then a number of competitors emerged concurrently, challenging the radio industry's traditional business model. "Seemingly overnight, satellite radio, Internet-only stations, podcasts, MP3s and iPods were changing the way America and the world listened. And all of it was quickly getting portable (Journalism.org, 2006). While radio remains an important

distribution source for the news media, the minute count of news broadcast per hour declined slightly in 2005. The overall depth of news reporting is shallow as well and "local news" is largely focused on traffic and weather to service its large commuter audience. Further, radio newsrooms are now servicing multiple stations as radio companies seek greater efficiencies. That is, there is very little news outside of traffic and weather and the limited number of the original stories that make it on the air. Aside from traffic and weather, radio basically recycles major headlines garnered from national wire services, and substitutes radio talk shows for in-depth investigative reporting. Nonetheless, radio remains an important distribution path that continues to reach a significant portion of the American public—94% weekly (Arbitron, 2005).

Online News: The future of the news media is, without a doubt, online. Unfortunately, the industry is still scrambling to develop a business model that makes the move to the Internet profitable. In an attempt to find the next big media idea, the news industry's leaders are investing heavily in the Internet. "No longer willing to compete against the Internet for viewers, the media giants are simply going where the audiences are" (Robertson, 2006). Fox Interactive Media President Ross Levinson describes his company's aggressive Internet strategy of acquisition thus: "Look, we're buying everything" (Robertson, 2006). Parent company, *News Corporation*, is spending billions on Internet acquisitions, dragging the rest of the industry along. In the summer of 2005, *News Corp*. bought *MySpace.com* for $580 million. This seems like an extraordinarily expensive venture, given *MySpace.com*'s quarterly earning of less than $5-million. However, it also brings in an audience of 46.2 million viewers per month in the 14-to-29 year-old demographic; a draw that matches the most popular television shows (Robertson, 2006). *News Corp*. also bought *IGN*, a video gamers' site for $650 million. The *New York Times* quickly followed, purchasing *About.com*, an on-line advice site for $410 million. *Viacom* purchased *NeoPets*, a popular kids' site, for $160M. *MSNBC* purchased *iVillage.com* for $600 million (Robertson, 2006). These acquisitions reflect an industry move away from brand-based web sites. Wanting more than just presence, media companies are searching for "sticky" Internet sites that may have little to do with news content but offer bells and whistles like photo publishing, music broadcasting or community networking. Such sites appear to keep consumers surfing longer; exposing them to more opportunities for advertising. Interestingly, none of these acquisitions appear to be part of a broader strategy to reinvent the news media industry. Instead, they are a response to the hard reality that shrinking viewership has forced companies to pay attention to any venue capable of drawing a crowd (Robertson, 2006). The long-term affect on news remains to be seen, but these moves reflect a willingness to move away from traditional models in order to grow an audience.

Summary of Conditions: There is no question the news industry has been subjected to a great deal of competitive pressure over the past decade. There promises to be more pressure to come as the Internet and wireless technology transform the way Americans receive news and information. But Saul Hansell of the *New York Times* believes none of this is a surprise to the media elites. "For decades, nearly every gathering of media or technology executives has defined the future with a single word: convergence. Yet for all the time they had to prepare for convergence, they are now scrambling to figure out what to do about it" (Hansell, 2006). According to John Malone, chairman of Liberty Media, "the anything, anytime, anywhere paradigm is really going to shift the world of media. There will be a tough, grinding transition for an awful lot of businesses" (Hansell, 2006).

Industry Challenges

Finding a Business Model that Works: Some futurists predict that the last newspaper will be recycled by its last reader by the year 2040. If this estimate is even remotely accurate, newspapers can no longer afford to hold on to their traditional business model and must begin to reinvent themselves now. This same future looms for the majority of traditional media outlets. As discussed in the "current conditions" section above, business models of the past are gradually breaking down and will eventually cease to produce the revenue to support the overhead costs of covering the news and generating news content. While migrating to the Internet is an absolute necessity for the industry, new business strategies must be adopted if the current news media industry is to survive in the long run. News providers must unbundle content and customize print, broadcast, and online content to make them relevant to the interests of individual readers (Crosbie, 2004). They must also bundle their content with that of their competitors; moving beyond their newsroom floors for news and syndicate all types of news content for their readers (Crosbie, 2004). Finally, rather than wait for readers to come to them, the news media needs to push content to the consumer in customizable formats that can be read from any device (Crosbie, 2004).

An Industry in Denial: Some sectors of the industry are burying their heads in the sand; making changes that only reinforce their current business models. One response from the newspaper industry is to say the situation is not as bad as the circulation numbers make it look. In 2004, the industry employed a strategy to shift the discussion from newspaper circulation to newspaper readership (PEJ, 2005). Jay Smith, chairman of the Newspaper Association of America, (NAA) wrote that "circulation is a flawed measure of the true vibrant audience newspapers attract…comparable to counting the number of TV sets rather than TV viewers" (Smith, 2005). But no matter how you slice it, readership is declining. (NAA, 2005) Other news purists believe advertisers and consumers are missing the boat and that all are best served by well-researched and well-written news content. They believe that gathering news, reporting stories and making editorial decisions about what is important are the core competencies of the news media. And the Internet hasn't changed those jobs at a fundamental level. Without news outlets to generate the material that *Google* searches and collates, there is no *Google* news. Those who refuse to adapt to the new media have been forced to tighten their belts and eliminate overhead costs as profits fall. Others are cutting costs by eliminating content, like stock tables, from their daily publications and forcing readers to go online to view them. While these strategies may work in a mature market environment, they are completely inappropriate for the emerging revolution within the news media. Those who adopt these measures may delay their inevitable demise. Survival, in the long run, will require something more.

Betting on the Wrong Technology: *Sirius* and *XM Satellite Radio* have invested billions of dollars over the last decade to create a commercial-free, subscription-based medium to compete with traditional radio. They have made tremendous inroads with the automobile industry to place their receivers in cars, attracted several big-name celebrity DJs, and built a strong subscriber base of early adopters. Yet, only *XM* hopes to reach positive cash flow by 2007. In response, the radio industry has launched high-definition (HD) radio -- providing CD-quality audio and three additional music channels per traditional radio frequency. However, HD radio faces a tough

challenge in deploying its technology to "the consumer's dashboard." In a classic chicken-or-egg scenario, the radio industry must provide compelling content to convince consumers to switch to HD radio. At the same time, they must build a big enough customer base to attract advertisers to pay for HD content. While both sectors fight to establish these new business models, they run the risk of being leap-frogged by terrestrial wireless technologies. As broadband wireless services propagate throughout the U.S., the mobile phone industry is ideally postured to displace both satellite and traditional radio services with streaming Internet Protocol (IP) based content via ever-more-capable hand-held devices. If wireless broadband is successful, the satellite radio industry will probably fold. Traditional radio will be seriously hurt, losing listeners and reducing already-dwindling advertising revenue. In a similar scenario, the cable television industry is betting its future on video-on-demand services; investing heavily in technology and infrastructure to store and stream movies to its customers. Even before this technology hits the market, it may be rendered obsolete as broadband technology enables streaming video over the Internet. If cable television fails to make its video-on-demand business model successful, its long-term survival will also be at risk. These are only two examples of high-risk, high-dollar investments that may become big losers as the industry struggles to reinvent itself.

The Loss of Journalistic Credibility: Over the last 15 years, public trust of the press fell to only 21% and less than half polled think the press actually protects democracy. Weak journalism, a lack of oversight on ethical issues, reports of deception, sensationalism, and difficulties in separating fact from fiction or news from entertainment are fueling this distrust. The more that trust is broken, the more difficult it is for news media to build bonds with the people it is trying to represent and serve. Kovach and Rosenstiel (2001) note the steady decline in trust toward press, driven largely by fears that self-serving commercialism has replaced their commitment to presenting the news. Driven by the demand for profits, news has become lighter and softer. This trend has negatively affected the news programs' ability to "inform and engage" the American people in a "meaningful" way. The news media industry is challenged to find the appropriate balance that serves the public with profound, timely, and accurate news –even as the business end seeks to boost its slipping customer base. Far too often, the public believes that the emphasis is on 'gotcha' rather than reporting news and sharing information to inform opinion.

Given the First Amendment, are news media willing to help promote these public interests? Will news continue to erode citizen confidence in government or break trust with its consumers so that no one knows what or whom to believe? The current trends show worrisome signs. A September 2003 poll found that 70% of Americans believed Saddam Hussein had a hand in the attacks against the towers of the World Trade Center and the Pentagon on September 11, 2001. This could mean the media did not devote sufficient time in debunking that myth and instead pitched softer news to its viewers. It could also mean that most of the country was getting its information from sources that chose to ignore the truth. In either case, the outcome is not good for democracy (Anderson, 2004). While news media industry leaders must keep their eyes on the business component, critical investigative journalism is at risk if resources are not available for journalists to investigate public interest, military, and national security stories. The currency of the information age is expertise and insightful perspectives that develop with experience and talent, in a career with attractive wages. Given the other pressures facing the industry, the new media must take the current credibility gap very seriously and begin a long, difficult effort to restore America's trust.

The First Amendment Under Siege: Many journalists perceived themselves to be under siege over the last couple of years, with dozens subpoenaed or questioned about sources in court (Smolkin, 2005). "In 30 interviews, journalists, First Amendment attorneys and media advocates cited anxiety about how best to guard anonymous sources, the degree of protections afforded by federal law and the sense that longtime assumptions about reporters' abilities to guard sources now appear unfounded or even naïve" (Smolkin, 2005, p. 34). The Valerie Plame case raised complex issues about how the media uses and protects sources, especially anonymous sources. The story heralded tough questions about some journalists, who chose not to follow standard journalist tradecraft, especially if they maintained contacts with the very people they are supposed to cover. The *Washington Post's* Howard Kurtz, who covered the Plame case sums the situation up with one tough question, "In the end, what did Judith Miller accomplish by spending 85 days in an Alexandria jail? Not much, say her detractors, noting that the deal the *New York Times* reporter ultimately made to testify about her confidential sources…was similar to agreements reached by…other journalists in the murky case" (Kurtz, 2005, p. A4). Kurtz continues, "Even some Miller supporters concede that the journalists involved are seen as protecting presidential aides who may well have been retaliating against Plame's husband…rather than shielding whistle-blowers who were exposing corruption" (p. A4). In Kurtz's judgment, "shielding whistle-blowers" is the far worthier cause. The news media's solution to the current situation appears to be support for a congressional shield law that reportedly has some bi-partisan political support and would protect the identity of sources in many federal cases. But this too is controversial among journalists. For now, the news media must successfully navigate this legal mine field while serving its public and business interests.

Industry Outlook

The news environment is more complex today than it has ever been. To survive, the media must figure out a way to tap into the psyche of the new consumers of news and reinvent the industry to support those customers. The traditional news media must broaden its options, expand into every feasible media alternative, and create information-fueled organizations that can quickly adapt to the changing environment. As if that weren't difficult enough, they must also convince investors and advertisers that they've got the formula "close enough" to warrant investment. Some will get the formula right and survive. Others will not. But it is unlikely that historical models of profitability will ever be realized again. Instead, we must look to new media trends for answers.

The Era of Participation: A 2005 survey by the Pew Internet and American Life Project found that 57% of American teenagers create content for the Internet. This number reflects a growing trend where people no longer consume media, but actively participate in it. (*Economist*, April 2006). As emphasized throughout this paper, this scenario drastically changes the media's business model. The era of large, passive audiences is giving way to one of much smaller, actively engaged audiences. In fact, participatory media are starting to blur the line between those that create content and those that view it. David Weinberger, of Harvard's Berkman Center, explains that the mainstream media are made up of closed, hierarchical institutions that claim infallibility (Weinberger, 2005). The conversational environment of participatory media is the exact opposite. It is open ended, assumes equality, and everyone is eagerly willing to admit

fallibility. Today's media giants are ill-equipped to reap profit from the participatory media environment. Instead, technologists predict, small firms and individuals will be the big winners; catering to and often collaborating with much smaller audiences.

Perhaps no form of new media better reflects the spirit of participation than the blogosphere. Bloggers are both the creators and consumers of Internet content. Their exchanges take the form of free-flowing conversations, exchanging a wide array of ideas and opinions. Blogs have become so prevalent that some predict everyone who now has an email account will have a blog in five years. If and when that happens, it may fundamentally change journalism.

The Rise of New Industry Leaders: When technology-savvy media mogul Terry Semel, CEO of *Yahoo!*, was asked what a 21st century media company looks like, his response was that he's no longer clear on what that means. (*The Economist*, p. 17) He does, however, point out that the coming of the Internet is a much bigger change then was the introduction of television. (*The Economist*, p. 17) Semel credits two key characteristics of the Internet. First, the user now determines programming. Users can go wherever they want, whenever they want. At *Yahoo!,* that even means a competitor's website. Semel believes it is this level of deeper engagement that will keep consumers tuned in. Second, he points out that you don't need hits to be successful on the Internet. In fact, he points out that many small audiences are as good as or better than a few large ones. Chris Anderson, of *Wired* magazine, calls this "the long tail." He contends that "old-media economics who are biased toward the hits at the "head" … are being replaced by new-media economics, which allow creation and consumption along an entirety of a much longer consumption tail." (*The Economist* p.17) In this environment, new media companies are happy to mix professional and user-generated content, but the trend is toward more user-generated content. So what exactly does the new business model look like? Semel believes it looks a lot like a stock exchange, where users offer and bid for content. (*The Economist*, p. 18) Advertisers will also compete in the exchange, bidding against one another to have their content placed in front of users. Says Jonathan Miller, CEO of *AOL*, "history would indicate that the newer companies that were designed for the medium will prevail" (*The Economist*, p. 18). New media companies are at ease with and implementing the long-tail economic model, while old media companies are still trying to churn out blockbusters.

Google is the world's most valuable media company. It has 50% more market capitalization than Time Warner, the largest traditional media company. The prototypical "new media" company, *Google* provides almost all of its user services for free and makes its money through advertising. *Google* sees the Internet as a common environment where consumers go for content. But instead of creating content, *Google* is making its money as the gatekeeper. They use computer algorithms to model user activity and push content based on that behavior. These algorithms enable users to create their own media experience, rather than relying on someone else to decide for them. In essence, *Google* has become a media giant simply by helping consumers effectively navigate and manage all of the content that is the Internet. Taking it a step further, their model also allows users to share in the financial benefits of their own creativity; selling both content and advertising space. If this is truly the new media business model, *Google* (and its prime competitor *Yahoo!*) are out in front of their competition. However, the ultimate winners and losers have yet to be decided.

Whether or not this new media environment is good for our democracy is also subject to debate. Some fear that the populace will use Internet tools to put up walls and shield themselves from ideas that are contrary to their point of view. This may lead to new virtual societies based on common prejudices, at the expense of public debate and compromise. At its worst, some fear that the Internet will provide a pulpit for the propagation of radical ideas. Michael Moritz, a venture capitalist famous for launching both *Yahoo!* and *Google*, fears the ease with which any group can spread their message. This is an important question for society as we conduct the Long War against radical Islam. Optimists believe that the wide variety of Internet content will make our citizens more, not less, aware of differing opinions. The Internet provides a market place for opinions and the opposing view is only a mouse click away.

The Government and the Media

Existing Regulation: The federal government has long played a major role in the broadcasting segment of the news industry. The Federal Communications Commission (FCC) is chartered to execute the laws governing television and radio broadcasts; including the Communications Act of 1934 and the Telecommunications Act of 1996. The FCC manages broadcasting licenses, frequency bands and power, and awards penalties for violations of the law. Governing both ownership and frequency assignment, licensing is the foundation of the FCC's regulatory reach for both the radio and television broadcasting industry. Without a license, organizations can't lawfully transmit over the airwaves within the United States. Even the resale of a broadcast license must meet FCC approval. In terms of foreign ownership, the barriers are very high and restrictive: foreign governments, non-U.S. citizens, and corporations or partnerships are barred from holding licenses to broadcast in the United States. In addition, the law limits foreign ownership of a parent entity of a licensee to 25%. Licenses are currently granted for eight years and are renewed unless the station demonstrates a pattern of abuse or a serious violation of the law (FCC, 2006). In other words, renewal is essentially guaranteed if a firm follows FCC regulations, but license renewal constitutes a unique risk to broadcasting companies.

While much of the government's regulation is driven by the technical aspects of frequency assignment, government regulation also extends beyond into ownership and broadcast content limitations. The FCC is chartered to regulate the content of broadcasts for 'decency' and the FCC actively uses its regulatory powers.

> Beginning in 2004, the FCC began leveling some of the heaviest and most wide-reaching fines in its history. By the end of his four-year tenure, according to an accounting by the Washington Post, Powell proposed 28 fines against television and radio broadcasters for so-called indecency violations. As the Washington Post noted, that is 30% of the 92 known proposed fines issued by the agency since Chairman Dean Burch in 1969 (Journalism.org, 2006).

Indeed, *CBS Radio's* very popular Howard Stern violated FCC decency regulations on several occasions, prompting the threat of $500,000 in fines and precipitated Stern's ultimate move to unregulated Sirius satellite radio.

A Technology/Policy Mismatch: The Internet is significantly less regulated than broadcast television or radio. Now that the Internet has matured to the point that content can be delivered on portable wireless devices, an interesting duality is developing in public policy. For example, is a wireless Internet broadcast heard on a portable device subject to radio regulations?

Currently, it is not. Further, are "Internet radio stations"—stations that broadcast only over the Internet and not over the airwaves—subject to radio regulations if propagated wirelessly? Does their origination on the Internet protect them from such regulations? There is essentially no functional difference between listening to a radio station wirelessly over the Internet versus listening to the radio, which raises issues regarding appropriate government regulation. There is little public support for government regulation of Internet content. Even if there were, the borderless, global nature of the Internet would make such rules unenforceable. Nonetheless, these legal questions will become increasingly relevant as portable, Internet-enabled wireless devices begin to threaten the profitability of traditional broadcasting companies.

Cross-Ownership: The Communications Act of 1934 significantly restricted the number of broadcasting stations an individual could control. It also placed limits on cross-ownership within the news industry as a whole, limiting the total number of media outlets an individual or corporation could own. The Telecommunications Act of 1996 reduced ownership restrictions within each sector of the broadcasting industry, but failed to loosen government limits on cross-ownership. Today, there is a running debate over cross-ownership which is making its way through the courts. Proponents of existing limits believe that further consolidation of the news media industry does not serve the public interest. They are concerned that giving the existing media giants the opportunity to buy up their competition will significantly reduce the number of voices heard, contributing to the lessening and lowering of the news we are currently seeing within the industry. Those in favor of cross-ownership point to free-markets as the best way to provide consumers with diverse news content. While there are historical examples to support both positions, the final argument may come down to economics and political clout. As the industry reinvents itself, consolidation may be a survival necessity for some within the news media. Those with the political leverage may be able to convince Congress to loosen the restrictions on cross-ownership. Whether or not the strategy of consolidation will be successful economically and best serve the public interest remains to be seen.

The Media as Watchdog: Within government circles, discussion of the news media generally takes an adversarial tack, based largely on the fear that the media might expose some mistake or misrepresent reality in a way that jeopardizes military operations and personnel. This concern is part of a broader struggle between the government's effort to conceal sensitive information and the media's determination to pursue the same information and is to be expected in America's free republic. As David Broder of the *Washington Post* explains, "We recognize there are some legitimate national security considerations for withholding information" (Broder, 2006). As an example, he sites the *Post's* agreement not to publish the countries where reported secret government prisons are located. But Broder also points out that administrations of both political parties have over-restricted information and that sometimes the only way for the public to learn of questionable government actions is through media exposure (Broder, 2006). Often, that exposure involves an individual inside the government who chooses to divulge classified information.

While the government can hold the leaker of information accountable, as we've seen with the recent firing of senior Central Intelligence Agency officer, Mary McCarthy, they can do little to suppress the story once the information is revealed publicly. Journalists claim that tension between the need for secrecy and the need for public accountability have grown worse in recent

years, citing the government's reluctance to divulge or discuss their policies and actions. Those within the government agree that the tension has increased, but cite the media's indiscretion and willingness to divulge sensitive information irresponsibly.

Strategic Communications in the Age of Transparency: U.S. government operations, particularly military operations, are becoming increasingly transparent to the media and the public. Journalism schools now teach extensive investigative reporting techniques and numerous workshops on the Freedom of Information Act (FOIA) are available for journalists, advocacy groups, and average citizens. Embedding reporters in combat units fully legitimized the public expectation of full disclosure in military operations, opening military combat operations to intense public scrutiny with minimal censure. Commercial intelligence resources, like Google's world-wide, high resolution satellite coverage, distribute imagery for free over the internet and are blurring the lines between information and intelligence. Numerous other organizations provide military assessments and analysis, including Jane's, EurAsia Group, Global Security, Strategic Forecast and Rendon Group, to anyone willing to pay the subscription price. Bloggers add additional transparency and have already reached a strong level of credibility through their transparent, two-way public dialogues. Regardless of political affiliation, bloggers have shown an interest and ability to double-check the facts on major news events, watching the watchdog so to speak. The spread of digital cameras has increased transparency in military operations. The digital images of Abu Ghraib were damaging in a way that words cannot convey. And because they were digital, the photos could be quickly distributed over the internet with extraordinary persistence and no chance of official containment. In the final assessment, it is clear that transparency is increasing throughout society, fueled by technological advances that make communicating easy.

As information has come to assume a central place in the conduct of military operations, the concept of information operations has been the focus of a great deal of intellectual debate. No part of information operations has been more heavily discussed than strategic communications. Some view strategic communications as the ultimate expression of military information operations, carefully blending public affairs, psychological operations, and intelligence to craft a message that effectively shapes opinion and leads to success on the battlefield. Unfortunately, this perspective smacks of propaganda and may prove a liability in today's transparent information environment. Instead, strategic communicators must understand media transparency and develop strategies to deal with its implications. This is not something our military has traditionally done effectively. However, enemies of the United States are using the media and the country cannot allow itself to be outmaneuvered in this critical domain. The Department of Defense (DoD) must embrace it and develop strategies to leverage transparency to our advantage. It must begin all operational planning with the assumption it will become public knowledge and that adversaries will try to use that information against us. To counter this threat, every military action must include a plan to engage in the transparent information environment. Strategic communicators must be truthful and candid; proactively acknowledging military operations and explaining what was done, why it was done, and the broader strategic implications. DoD must find ways to do this without compromising tactics, future intentions, personnel, and intelligence sources. While the Department must get the message out both at home and internationally; the most important audience is within the Islamic world. There, DoD must engage in the appropriate languages and emphasize regional goals, themes, and priorities.

When possible, strategic communicators must give credit to regional allies who will benefit from such publicity. Ideally, the United States also should help its regional allies develop this same media savvy; as they possess a street credibility and legitimacy the U.S. alone can never hope to match. Embracing informational transparency is counter-intuitive to most military planners. Nonetheless, DoD must develop tactics, techniques, and procedures to disclose fully what we've done and why, without compromising tomorrow's fight.

Strategic communicators must also understand and respect the news media's twenty-four-hours-a-day news cycle. Those in the government often prefer to wait until all the facts are in and have a planned response developed and implemented before engaging the media. However, the media news cycle demands more frequent caring and feeding. To enable the media to meet its endless appetite for information, the military needs to engage the media with timely information that does not jeopardize ongoing operations. If the military is slow to release information on a breaking event, the media will get its information elsewhere and question the military's motives. Even the military's well-intentioned attempts to provide updates on our schedule are often viewed as stonewalling.

Conclusion

Some observers predict the current revolution in the media will drive societal change on a scale not seen since Guttenberg invented the printing press in 1448. While it will take some time for that prediction to play out, the impact of technology convergence on the news media industry has been profound. The industry is being forced to reinvent itself. The stakes are life and death for media giants, with billions of dollars riding on the outcome. Some will adapt and survive. Others will not. New industry leaders are emerging to move the industry toward change. What the industry will look like at the end is anyone's guess. Certainly, though, it will look nothing like it does today. While media traditionalists will lament this loss, the new media offer unprecedented access and freedom of expression consistent with American ideals of a free and open society. It may also prove instrumental in opening up closed societies around the world.

The changing media bring a level of information transparency the federal government and military are only beginning to understand. As the military learns to operate in this new environment, traditional media/government relationships will be forced to change. Transparency cuts both ways, with each side of this historically contentious relationship struggling to develop rule sets to operate effectively. The current battles over press leaks and secret sources reflect this friction. They are a natural by-product of change, as both sides adapt and evolve. Unfortunately, dealing with media change is not the only issue on the federal government's agenda. The U.S. Government must continue to develop the capability to operate successfully in the transparent media environment while simultaneously fighting the global war on terrorism. This fight is more than a kinetic war. It is a war of ideas with a determined enemy contesting our efforts in the information domain. Understanding the transparent information environment, to include our evolving relationship with the media, is critical to success. The news media is not the enemy, but they are more than just the terrain. The better we understand the news media-- their perspectives and their priorities-- the better we'll be able to develop tactics, techniques, and procedures to be survive and thrive in the information domain.

Essays on Major Issues

Information Operations, Public Affairs, Public Diplomacy, and the Media: An Inescapable Tension in the Information Age

Mr. Thomas Hodges, U.S. Dept. of State

Living in the information age, it is inevitable that America's wars will be fought in the infosphere as well as on traditional battlefields. Ideas, ideology and information play a far greater role than ever before. This creates a new tension among the public at large, the troops who fight in the infosphere conducting Information Operations, military public affairs officers (who sometimes share the same realm as the info operators, but with a different mandate), State Department public diplomacy officials, U.S. media, and foreign media.

If one looks at the infosphere as a battlefield, then most of the world lives on that battlefield all the time. Though Information Operations are hardly a new phenomenon, the nature of global instantaneous communications and information technology render it impossible to isolate one's target. Cultural and linguistic differences can slow the transfer of information across national borders, but hermetically sealed audiences are a thing of the past. A contractor involved in Information Operations said as much when interviewed for a *Los Angeles Times* article about the new dynamic of info ops in Iraq: "There is no longer any way to separate foreign media from domestic media. Those neat lines don't exist anymore" (Mazzetti, 2005, p. A1). Furthermore, America's most vexing enemies are not nation states, but rather stateless actors living among others, whose friendliness or hostility toward the U.S. varies greatly. For this reason, the United States must exercise great wisdom in its use of Information Operations and not compromise the values that make America great.

A highly illustrative example of this tension comes from the case of the Lincoln Group, which produced articles with positive news about U.S. nation-building progress in Iraq, then paid newly-independent Iraqi newspapers to carry them. The newspapers passed these off as if written by their own reporters. The Lincoln Group's efforts were part of a contract with the Department of Defense. Although the Lincoln Group project represented an American attempt to win a battle in the Long War in Iraq, the United States – by its own choosing – is the real power on the ground. As such, is responsible for that nation's democratic development. U.S. citizens have invested millions of tax dollars to teach Iraqi journalists, long unable to practice their craft properly under Saddam Hussein, about the media's role in a free country (O'Connor, 2005). Surreptitious taxpayer-funded payola, already unsavory by its very nature, is all the more questionable when working at cross purposes with other U.S. government programs. Nicholas Cull, director of the graduate program in public diplomacy at the University of Southern California and a propaganda historian, was one who questioned the value of the Lincoln Group project. "If [paying for placement] does work in Iraq, if the Iraqi people feel differently as a result of this, then it's justifiable. But I would be surprised if they do…The people in Iraq know much more than we do about what's happening there" (Memmott, 2005, p. A12).

There also have been high-level critics of the program within the Pentagon. A senior DoD official said, "Here we are trying to create the principles of democracy in Iraq. Every speech we give in that country is about democracy. And we're breaking all the first principles of democracy when we're [paying for article placement]" (Memmott, 2005, p. A12). Lawrence

DiRita, formerly the Assistant Secretary of Defense for Public Affairs, someone with a stake in the debate between practitioners of public affairs and those of information operations, queried the effectiveness of the program. "If somebody comes back to me and says there's nothing wrong with the Department of Defense paying journalists, I'll say, 'Even if there's nothing wrong, does it make sense?'"(Mazzetti, 2005, p. A12). Ethics or moral objections aside, secrecy is key to a successful information operation. Reuel Marc Gerecht, a former CIA case officer said of the Lincoln Group project in a *Washington Post* article: "Had the program been conducted completely undercover, it would have been better….Much of what you do, ought to be covert, and certainly, if you contract it out, it isn't." (Dukem, 2006, p. D1). The Lincoln Group project, however, was neither straightforward nor covert. Given the nature of the project, it is hardly surprising they didn't advertise what they were doing. "We don't want somebody to look at the product and see the U.S. government and tune out," said one psy-ops Colonel of the project (Gerth, 2005). Still, for the United States to carry out such an action in Iraq, where we're already in charge, where the media are largely free to publish whatever they like, and where wages are pitifully low (rendering journalists easily susceptible to such temptations) it seems beneath us, and suggests a lack of imagination, not to mention rectitude. Furthermore, the project did a terrible disservice to our nation-building goals in Iraq. Not only did it compromise the credibility of newspapers known to have accepted payment for placement, but graver still, it undermined the credibility of the media as an institution – at the very time the U.S. is working to establish media's role in that benighted country as an incorruptible watchdog of civil liberties.

Lawrence DiRita provides some insight as to why the Pentagon became so involved in the contest for global influence: resources. With the 1999 abolition of the United States Information Agency and the attendant drop in civilian resources in fighting the global war of ideas compared against DoD's deep pockets, DiRita was not surprised that the Pentagon would try to "fill the vacuum…We have a lot of skilled people, a lot of energy, and a lot of money…but I question whether the DoD is the best place to be doing these things" (Mazzetti, 2005).

Across the armed services there are fewer than 1300 military public affairs officers. DoD's total budget for public affairs was $140 million in FY 2006. The State Department has approximately 500 public affairs officers in the field at any given time, and has a public diplomacy budget of approximately $760 million, more than half of which pays the costs of academic and short-term exchange programs (Ford, 2005). By contrast, just one psychological operations unit at Fort Bragg is 1200 strong (Gerth, 2005). Though the exact amount the U.S. military spends on psychological operations is difficult to calculate, three psy-ops contractors alone currently enjoy five-year contracts with the Pentagon for $300 million. One of these is the Lincoln Group. This is not bad for a couple of guys in their early thirties who, two years ago, "were living in a half-renovated Washington group house, with a string of failed startup companies between them" (Cloud, 2006, p. A1).

The Department of Defense has tried to establish some clarity in dividing the labor among its Public Affairs and Info Ops troops, and how Information Operations should interface with public diplomacy. The recent *Joint Publication 3-13 on Information Operations* states that the "primary purpose and rules under which [public affairs and defense support to public diplomacy] operate *must not be compromised by IO*." A 2005 piece on info ops from the *Air & Space Power Journal* states: "Anyone planning and preparing to execute [an information operation] within a given area must realize that the U.S. ambassador has responsibility for America's interests in a particular country. No matter the phase being executed in a plan, the ambassador and his or her team will coordinate activities within that country" (Mazzetti, 2005).

The media honest enough not to accept payola will not hesitate to shine as bright a light as possible on those seeking to cultivate influence with them through less than upright means. Even in instances where one can argue that U.S. national security interests are at stake (as many did in the revelation of the Lincoln Group's activities), American media will be no less prompt to draw attention to info ops activities than any other nation's media. Journalism (at least for wire services and cable/satellite TV news) is as globalized as an industry as any other, and American media know that if they don't report the story, some other journalist will. And almost no journalist will volunteer to be scooped.

All this might be enough to suggest that information operations through the media are a bad idea. This is not necessarily the case. As any good student of warfare knows, Sun Tzu said, "to subdue the enemy without fighting is the acme of skill." Information Operators are attempting to do just that. If they are successful, they have saved American lives and achieved their goals, usually at significantly lower cost than any kinetic means. The problem, as the Lincoln Group project so clearly shows, is that the cost of a backfire is high. For this reason such endeavors – when absolutely necessary – must be taken with utmost care, consideration and, as appropriate, secrecy.

Finally, protection of the American public from dis-informational friendly fire must be paramount. In 1948, Congress passed the Smith-Mundt Act, the purpose of which was to protect the United States from distribution of its own propaganda. The idea was to prevent U.S. foreign policy tools from being used to influence a domestic political contest. It was easy to enforce in 1948. U.S. Government print publications were simply distributed overseas, not in the United States. Shortwave radio broadcasts beamed into other countries, and were difficult to pick up in the U.S. The Internet and satellite TV changed all that. The temptation to use the media for information operations, the effects of which may blow-back on the American public that is part of the global media audience, has given this half-century old legislation new relevance. In using the media to secure national security goals, the United States must be careful to protect not only its image in the world, its reputation as a champion of the great institutions that ensure democracy (such as unfettered media), but also its own people.

Media Education

Mrs. Constance Short, DCMA

During Operation Enduring Freedom (OIF) and Operation Iraqi Freedom (OEF), journalists were assigned to combat units. This embedding of journalists was not new; there are historical accounts of combat journalists on the battlefield. In Vietnam, there was no formal embedding program. But, at any given time, there were approximately 500 journalists in Saigon.

The embedding of journalists in OIF and OEF has been hailed as an overwhelming success, yet there has been extensive criticism of journalists becoming enamored with the young soldiers and glamorizing combat operations. The journalists' lack of a strategic overview and their inability to interact with the host nationals may have stifled their ability to capture a fair and balanced view of the war. Notably, much of the disparagement has been the result of extensive military security measures taken to protect the journalists; no doubt the need for such measures will be debated for years to come.

Furthermore, while recently visiting with several news organizations around the DC area, the ICAF New Media Industry Study has discovered that military education for journalists has not improved since Desert Storm. Not only do many journalists not have military backgrounds, they have had very limited exposure to the military at all. Their observations during the embedding program were not of seasoned military reporters providing an analytical assessment of the intrinsic nature of combat operations, but those of uneducated bystanders left to their own devices, reporting only what they can comprehend, not necessarily what is truly taking place.

Several ICAF students were military commanders with embedded journalists as part of their units during OIF. They unanimously expressed that the lack of news media training prior to deployment and/or prior engagement with the news media put them at a disadvantage. The DOD employees and journalists have an adversarial relation that has been further complicated by the lack of news media training received by the military prior to deployment.

In order to understand fully the news media's viewpoint, DOD must institute a comprehensive integration plan through training opportunities. It has been painfully evident that with or without DOD's cooperation, the news media will report what it considers news. Many times, without DOD involvement, the information reported is not completely accurate nor does it represent a balanced view. It is imperative that DOD ensures that their story is first and accurate in order to win the information war. Releasing news about a particular engagement must be part of the initial operational planning. To meet this mission, DOD must aggressively engage the news media by training all members, military and civilian, on the news media industry.

Typically, there is no time for information (or breaking news) to travel through the appropriate chain of command prior to release. DOD must empower each individual to represent the Department without the time demands required from a typical chain-of-command structure. The U.S. Coast Guard (USCG) has already implemented the type of policy direction that should be adopted by DOD. The Coast Guard recognizes that the individual represents the Department and interacts with the public, daily. It is easy to see the similarities between the USCG's public interactions and the daily DOD experiences worldwide. The individual, not the chain of command or solely the PAO, shoulders the cornerstone of the Cost Guard public affairs program.

As part of the preparation function, DOD members will be trained to prepare for the type of questions journalist will ask and to limit their remarks to aspects they are personally involved in, efforts that are not classified, and/or efforts that will not endanger the security of an operation. Not only will the members learn what they can and cannot discuss, they will practice conveying their message via different media outlets. America's enemies have successfully leveraged the news media to turn public opinion against the U.S. It is high time that the U.S. empowers DOD employees to provide accurate and concise information instantaneously to the news media through the embedding program to fight back.

Instantaneous news releases prevent DOD from relying on the chain-of-command and public affairs offices to distribute information. Our enemies are getting their news out first, and although it is inaccurate and biased nevertheless their streamlined information release processes force the US into a defensive posture. The ultimate solution is to empower DOD members, through extensive training, to engage aggressively with the news media. It is imperative that DOD leverages the news media industry as a tool to the first line defense in the informational warfare existing in today's worldwide 24/7 news cycle.

Embedded News Media: A Troubled Marriage Between the News Media and the Military

Howard R. Ferguson, COL, USA

The news media's coverage of war has played a significant role in chronicling the dynamics of war and prompting debate at the national level. The subject of war contains all the elements of newsworthy coverage interwoven into one theme, everything from life and death to duty, honor, and country.

Embedded media play an important role in American warfare. Professional journalism helps to maintain balance and accountability, and fosters an informed public. This paper will discuss the embedding process with respect to the First Amendment, trust, sharing of information, the media's view, and the future of embedding.

In an environment such as war, abounding in, as Clausewitz described it, "fog and friction," it is important to allow the media to tell the story: good, bad, or indifferent. At times, the story will be favorable and other times the story could be unfavorable or even embarrassing. In fact, a reasonable consumer of news does not expect all news to be good; that does not coincide with human nature.

The *U.S. News & World Report* article, *"Reporting from the Front Lines: 100 Years of War Reporting"* (2006), stated it well:

> War has defined human existence for centuries: Its atrocities have stood testament to the darker side of humanity, while its heroes have reminded us of nobler qualities - selflessness, compassion, and loyalty. For nearly 150 years, journalists have risked their lives to chronicle the human condition, to give war a conscience and context for those whose loved ones have been drawn into battle. Reporters such as Peggy Hull wrote about details of the soldier's life in World War I; Ernie Pyle profiled the experiences of enlisted men during World War II. (p.1)

Embedded media coverage will most likely have an impact on public opinion. A reporter's accounts of life on the battlefield will most likely play on public sentiment, and this has a way of manifesting itself in U.S. politics and therefore influencing public policy. However, in the end, embedded media will serve the public well and help break down the natural tensions that exist between journalist and the men and women that they cover in uniform.

The relationship between the news media industry and its coverage of military operations is a well-documented subject in the annals of U.S. history. Professional journalists have been a component of U.S. warfare and a concern for the U.S government and its military leadership from the early days of the Civil War to today's high tech military force. Over the course of U.S. history, opinions of senior military leaders have ranged from an atmosphere of contempt to a feeling of partnership. During World War I, the relationship between the news media and the profession of arms was one defined by government censorship and regulation. The *U.S. News & World Report* article, *"Reporting from the Front Lines: 100 Years of War Reporting"* (2006), outlined several key points highlighting this position:

- When the U.S. entered the war in 1917, President Woodrow Wilson's executive order allowed the Navy to censor international radio and telegraph messages.

- In June 1917, Congress passed the Espionage Act that allowed for prosecution of anyone publishing opinions considered disloyal or harmful to the war effort.
- President Wilson established the Committee on Public Information to promote propaganda supporting the war and censor news items like war-related photos.

World War II was also a period marked by government censorship of war coverage. The *U.S. News & World Report* article (2006) highlights a few examples:

- In 1941, President Roosevelt established the Office of Censorship to prevent news agencies from publishing information that the enemy might find useful.
- In 1942, the President established the Office of War Information to control news flow of information in the government and manage the release of war news.
- The media submitted all reports to military censors prior to publication.
- The government refused to release photos of American dead for the first two years of the war.

As highlighted by a senior war correspondent during a lecture to the Industrial College of the Armed Forces' News Media Industry Study Group in April 2006, the Vietnam War was the first U.S. war that gave the press free access to all soldiers, marines, sailors, and airmen. The government allowed the reporters to travel in military transportation: air, land, or sea. The Vietnam War also had it challenges. The *U.S. News and World Report* article (2006) listed several interesting facts:

- In 1965, President Johnson made three attempts to impose censorship on the press, but failed to garner support from Congress.
- The military provided information and propaganda to the press. The military established the five o'clock press briefing to inform the press corps.
- Reporters and military leadership used an honor system and agreed not to publish information until battles have commenced.

During the Persian Gulf War, the military established a press pool concept that had its headquarters in Saudi Arabia. From that location, the military press coordinator farmed-out media representatives to interview military personnel. According to *U.S. News & World Report* (2006), approximately 200 of the 1,400 reporters in the region had the opportunity to cover combat operations. The media pool concept was a major issue for the news media; competition, access, and being the first to report the story of the day drives the news media industry. Secondly, the military exercised strict control over what photos, print, and film journalist could publish using operational security as the reason. It is important that journalist and military leadership understand both the struggles and barriers of earlier embedded media/war correspondents centered on censorship and access to combat operations.

The First Amendment of the U.S. Constitution guarantees religion and expression: the freedom of religion, the freedom of speech, the freedom of the press, the freedom to assemble, and the freedom to petition the government. Two of these rights-- freedom of speech and freedom of the press -- require both dialogue and action from the journalist and military leadership to create a command climate that fosters trust and understanding.

A Freedom Forum First Amendment Center Study (Aukofer & Lawrence 1995) noted that the media and military often have been at odds, but found that tension escalated in a brief eight year period – from the invasion of Grenada in 1983 and Panama in 1989 to the Desert Storm victory in 1991. Aukofer and Lawrence (1995) highlighted that these three wars led to bitter complaints by the news media that the military had completely shut out news coverage (Grenada), needlessly delayed a press pool that it had helped create (Panama), or stifled journalists through censorship, delays, and denial of access (Desert Storm).

The Aukofer and Lawrence (1995) study also found that despite past disputes, leaders in both the media and military institutions understood the importance of the other. Military officers acknowledged the people's right to know, and 83% believed the news media is essential to maintaining American freedom just as much as the military.

Embedding media into military formations and allowing them access to the soldiers, sailors, marines, and airmen participating in combat operations will solve this sense of distrust and facilitate the sharing of information.The process of embedding press into military organizations is one strategy for improving news media and military relations. According to Richard K. Wright in his 2004 Institute for Defense Analyses paper, *Assessment of the DoD Embedded Media Program,* there were 692 reporters, photographers, producers, cameramen, and technicians were embedded with ground units, on ships, and at air bases for an extended period of time in 2003 during Operation Iraqi Freedom. He acknowledged that the concept was not new, but the sheer numbers of embedded press was unprecedented. Wright (2004) concluded that the military-media relationship was strengthened, the cultural gap was reduced, and many lingering mutual suspicions were greatly reduced. While commander in the Third Infantry Division during Operation Iraqi Freedom, I had a CBS reporter embedded in my unit. Although we did not always view things from the same perspective, it was a positive experience. I focused on leading my organization in war, and the CBS journalist focused on reporting the news to the American public.

The 2003 Project for Excellence in Journalism Study, *Embedded Reporters: What Are Americans Getting?,* found that the embedded coverage was both exciting and dull, combat focused, and mostly live and unedited. Much of it lacked context, but it was usually rich in detail. Other findings were:

- In an age when the press is often criticized for being too interpretive, the overwhelming majority of the embedded stories studied, 94%, were primarily factual in nature.
- Most of the embedded reports studied—6 out of 10—were live and unedited accounts.
- Viewers were hearing mostly from reporters, not directly from soldiers or other sources. In eight out of 10 stories, we heard from reporters only.
- This was battle coverage. Nearly half of the embedded reports—47%—described military action or the results.
- While dramatic, the coverage is not graphic. Not a single story examined showed pictures of people being hit by fired weapons.

Note: This study examined morning and evening newscasts aired on March 21, 22, and 24, 2003.

The embedded media phenomenon is here to stay. Terence Smith (2003) in his *Columbia Journalism Review* article, *"The Real-Time War: Defining News in the Middle East"* writes that it is impossible to imagine a future U.S. military campaign without reporters embedded in the frontline units, without instant transmission from the battlefield, without tank mounted and lipstick cameras, satellite phones, grainy-green night-vision cameras, and collective consciousness. Smith concludes that there is no going back.

The embedded news media concept is probably a permanent fixture during armed conflict. Robert Jensen, an associate professor of journalism at the University of Texas at Austin and author has a dissenting viewpoint. He thought that the news media embedded during Operation Iraqi Freedom failed the American public. He believes that the embedded media concept interferes with the independence of journalistic freedom to express ideas through a pure unfiltered lens. In Jensen's article, *Embedded Media Give Up Independence* (2003), highlighted three items that citizens in a democracy should expect from journalist:

- A trustworthy source of the facts gathered independently of power institutions.
- The historical, political, and social context to help make sense of facts.
- The widest range of opinion to allow people to test their own conclusions against alternatives.

BLOGGING: AMEDIA FORUM WHERE AMATEURS HAVE A VOICE

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Throughout history, Americans have lobbied extensively to safeguard their civil liberties, more specifically, their first amendment rights and the freedom of speech. Even though these rights are protected by the United States Constitution, they remain highly debated today. Nonetheless, the freedom of speech remains critical in a true representative democracy. As an integral component of American society, the freedom of speech has opened a door for a new breed of online computer users to exercise their constitutional rights, known as Bloggers, who have heralded a new age for the news media.

Bloggers, have become part of a growing movement that empowers people to demonstrate their journalistic talents, convey their thoughts, and provide comments on every subject ranging from politics to personal journals. According to many experts in the news media industry, as America's computer savvy generation ages, sufficient momentum may mount to supplant the traditional means by which Americans gather news and information (i.e., television, radio, and print). This is particularly frightening to many educated Americans, as the internet provides a global reach for bloggers, but ignores the fact that many may lack the credentials and factual content to report on issues of vital importance to the public. Nonetheless, the popularity of these amateur journalists is growing and with the backing their first amendment rights, bloggers will continue to effect change in American culture, for better or worse.

According to David Kline and Dan Burstein, authors of the book, *blog! how the newest media revolution is changing politics, business and culture,* the inception of blogging can actually be traced back to 1997. However, they are quick to comment that it really began to grow and attract membership (in the low hundreds), as blogging software, which made it easier to blog, was introduced into the market in 1999.

The first issue creating a rise in blogging involves a decline in trust on the part of the American public in the traditional news media. Without hesitation, one could easily conclude that this is obviously an accepted assessment among many news industry professionals. In fact, most news media insiders were forthcoming in acknowledging the reality that the general public has lost trust and confidence in their ability to get the story right. Likewise, they are aware of the polls that indicate that distrust in the news media is growing. This is highlighted by a Pew Research Center Poll during the 2004 election, where 45% of Americans surveyed stated that they believe little or nothing of what they read in their daily news papers (Kline & Burstein, 2005). Further, in my opinion, as influential figures like Jon Stewart, from *The Daily Show*, air their opinions on national television and belittle the argumentative debate and fact less assertions promoted by today's news media networks, such as CNN's Crossfire, people take notice.

Second, bloggers contend that there is no middle ground in reporting and openly discuss their disappointment online about current news media suppliers. Notwithstanding a detailed explanation, those listening to traditional news, in many cases, either get an extreme left, or far right spin on a particular story. This is especially true when politics enter the mainstream. In fact, the experts that we spoke with in the field confirmed that depending on the source, the listener/reader is subject to either a liberal or conservative slant. This topic brings to mind the famous Time magazine cover, where O.J. Simpson's photo was intentionally darkened as to portray an image of guilt and of a man lurking in the shadows. Unfortunately, the jury had not even rendered a decision. Nonetheless, it's clearly articulated in many web articles that bloggers prefer to make their own assessment and decisions as to where they stand on a certain subject.

Another noteworthy point is that statistical evidence shows that the chatter initiated by bloggers increases during highly publicized political and social matters. In my opinion, there may be several reasons for the rise in message traffic. First, although bloggers share similarities with many Americans who want to have a voice, their approach is somewhat different. They want real-time discussion and total freedom (without authority) to express their concerns. As one journalist stated, "they want immediate feedback and mass idea generation." In addition, the internet not only provides quick access to large audiences, but it serves as a shield for those who are not comfortable or confident in personally addressing an audience. Furthermore, blogging eliminates the necessity of physically assembling and negotiating the bureaucratic process of filing for a petition to express concern over a particular issue.

To fairly represent those in the news media industry, there does appear to be some policing in-house to get the story right. However, the overriding theme, irrespective of who we questioned, whether television, radio or print source, reflected the importance of breaking the story first and chasing accurate details later. Additionally, the counter argument to their bias in reporting may be directly linked to economics and ratings. Obviously, the large media networks know their audience and understand what sells. Likewise, in order to survive, they must feed the appetite of their viewers.

While conducting this research and scanning many blogs, it became evident that bloggers are actually open to different ideas and tolerant of other writers views. With the exception of a few blog sites, most bloggers posted dissenting viewpoints along side of their own in the blogosphere "world of blogging." Although much of the dialogue I observed lacked factual content, which is somewhat alarming, bloggers are electing to exercise their right to freedom of speech. The Internet not only provides quick access to large audiences, but it serves as a shield for those who are not comfortable or confident in personally addressing an audience. Furthermore, blogging

eliminates the necessity of physically assembling and negotiating the bureaucratic process of filing for a petition to express concern over a particular issue.

In an article title *Blog Power*, published by Forbes.com, statistics show that there are some 14 million blogs. The article further contends that blogs are growing at a rate of 12,000 a day and cumulatively, bloggers post content about 275,000 times per day on nearly every topic. Additionally, using information from an unidentified source, the article maintains that 50 million people regularly read blogs (Schifrin, 2005).

Although the demographics of blog authorship are somewhat disputed, the bulk of bloggers are in the under 30 years of age demographic. According to a Perseus study, over 90 percent of blogs are authored by people between the ages of 13 and 29, with 51.5 percent between the ages of 13 and 19 (The Blogosphere By the Numbers, n.d.). This information is particularly important for understanding the shift in the news media industry (away from print media). Young people, as well as others appear to be flocking to the internet. Likewise, throughout our travels, many of the traditional news services (television, print and radio) were struggling to establish online capabilities.

Although there was no outward display of apathy towards bloggers by those in the news media industry, the tremendous loss of print subscribers, with the exception of USA Today, has created momentum for all traditional sources to develop and refining electronic reporting capabilities. Although, it's interesting that bloggers are beginning to establish mini-news shows, such as Rock Bottom (video blog or "vblogs"), who has affiliate correspondents in Boston, Los Angeles, Minneapolis and Switzerland, it's is unlikely that bloggers could compete against large scale networks (Schifrin, 2005). Obviously, the barriers to entry include a lack of capital, infrastructure and a sizeable workforce. Notwithstanding the fact that most educated consumers would not accept the opinion based and myopic sort of reporting that bloggers present. However, from an optimists perspective, perhaps in the future, news bloggers may replace traditional news segments (anchors) as the cable networks of today replaced some of the more powerful television channels of past.

Specifically reporting on our findings, one print news media network that we visited does encourage their correspondents to answer opposing blogs. However, there is an unwritten policy that prohibits the correspondent from speaking on behalf of the network. In addition, the correspondent must remain free of bias and personal opinion as to eliminate the perception of an assault on the sender. One independent journalist did confess to owning a few blog sites. He uses these sites to gain access to different ideas and to find flashpoints. In fact, on occasion, this journalist draws ideas from these blogs to use on a weekly talk show. It's visible to me that those in the profession of journalism have no problem with bloggers expressing their opinions or carrying out their civil liberties. Nor did I get the impression that established   news networks felt threatened by them. In retrospect, bloggers actually keep the news media industry honest and on their toes.

According to a recent briefing titled *Operations Security (OPSEC) in the Blogosphere*, by the Army's 1st Information Operations Command, blogging has become increasingly popular among the troops. In fact, www.mudvillegazette.com is a useful source for gauging morale and insight into the daily lives of troops world-wide. To expand on this subject, this publication mentions that there are roughly 170 military blogs on the Mudville Gazette site, with more than 1,200 associated website links. The same document also attributes soldier blogging to: a belief that the news media isn't telling the whole story, an easier means for communicating without having to memorize a host of email addresses and greater interaction and shared experiences with large

groups. Although, there is general consensus that the people reading these blogs are politicians, historians, retired military and family members, without question, given its access to technology, the enemy is likely reading them as well.

In an effort to gain tighter control over soldiers who want to blog, CENTCOM has developed an umbrella policy for OPSEC (includes all forms of information protection). Individual units are then required to further define their policies, within those guidelines, in respect to OPSEC, blogging, email and internet use in the AOR. In the absence of a training packet to teach security in the blogosphere, the briefing mentioned above may serve that purpose. It uses real-time blogs to provide insight regarding acceptable and non-acceptable content. Additionally, in response to CENTCOM's initiative and to purge the internet of sensitive military information, the Army has assembled Mobile Training Teams (MTTs) to ensure deploying soldiers/units understand operational security guidelines. Unfortunately, being driven by a condensed timeline prevented research on other services OPSEC policies.

Highlighting the Army's policy, soldiers are prohibited from posting sensitive information such as photos showing vehicle damage, battle scenes, casualties and the impacts of enemy targeting and tactics. For the most part, under their 1st amendment rights, soldiers can read anything they chose and write to newspapers, but they can not partake in partisan politics or undermine the good order and discipline of the unit. Soldiers are also not authorized to blog on government time, or with government equipment. As a policing action, Army Web Risk Assessment Cells and Information-Assurance Teams continually access web sites and monitor information for compliance with Army policy. All of this information can be gathered from the 1st Information Operations Command briefing.

Another question relative to this topic is how the services are responding to various blogs? The two military organizations that we visited both had aggressive planes for addressing blogs to post a military downlink to their site. This is made available to the owner, as a means to provide their reader(s) with multiple perspectives on a particular issue. The military then responds directly to the reader on the downlink. According to the military officials we conversed with, bloggers are generally inclined to support. The military will never have enough resources to out pace the bloggers, but they can work for the opportunity to tell their story.

Although the U.S. Military can draft policies and regulations to prohibit Service members from blogging, or posting inappropriate information to the web, the same control cannot be exerted over coalition partners. Obviously, misuse of sensitive information, such as disclosing the vulnerabilities of equipment, jeopardizes the safety of American troops and national security. Nevertheless, the U.S. Military and Department of Defense must consider using blogs for multiple purposes including recruitment, analyzing where the populace (home or abroad) stands on certain issues, and for examining the asymmetric threat (i.e., studying Jihadi blog sites).

The future of blogging is being defined every time the technology industry introduces new equipment into the market. In fact, the quantity of potential participatory journalists is expected to grow exponentially over the next few years, in all demographics. Video bloggers with digital cameras are already creating mini-documentaries, news casts, and parodies on their own (Schifrin, 2005). The Army and Navy are unique in that they both approach contentious blog sites and ask the owner "blogger" market segment to explode is significant. Likewise, niche bloggers are already undoubtedly a critical reference tool for many consumers and news media professionals. As the blogosphere continues to grow, many changes will be necessary to regulate how liable laws and others legal matters will be applied to internet market failures. The future of bloggers is unlimited as long as Americans embrace freedom of speech and expression.

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